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## Consumer Trends

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### Dear Readers,

Once more we welcome you to a new edition of our CEE Newsletter on the topic of Consumer Trends.

Recently, the world has undergone major economic and financial developments. Bearing in mind the gravity of these events, it becomes apparent that a close look has to be taken at the focal point of all business interaction – the consumers themselves. We have therefore dedicated this issue's focus to the consumer as such and his current and intended consumption behaviours.

As usual, we have collected a number of interesting articles from throughout the CEE region, this time coming from countries as diverse as Austria, the Czech Republic, Romania, Russia, Serbia and Slovakia. By touching upon various issues and countries, this newsletter demonstrates the spectrum of consumer reaction to a rather unfavourable consumption climate. It ranges from general cutbacks on »excessive« expenses to major shifts with regard to shopping preferences.

As this newsletter will be the last one to be issued this year, we also would like to take the opportunity to thank all our customers for your confidence in GfK in 2008 and wish you a Merry Christmas and a prosperous and happy New Year 2009.

Yours sincerely,

- ▶ Gerhard Ortner-Pitzl, GfK Austria, Head of Division Custom Research
- ▶ Tobias Schediwy, GfK Austria, Head of Division Consumer Tracking

You can find further information about the findings of our studies under [▶ www.gfk.at](http://www.gfk.at) or via the links from this site to the web sites of all the GfK companies in Central and Eastern Europe. [▶ e-mail us](#)

▶ GfK Austria	▶ GfK BH	▶ GfK Hungária	▶ GfK Praha	▶ GfK Skopje	▶ GfK Slovenija
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▶ GfK Belgrade	▶ GfK Croatia	▶ GfK Polonia	▶ GfK RUS	▶ INCOMA (CZ)	

# Austria

## Consumer behaviour 2009: One in four tightens their belts

One in four Austrians is planning to reduce his or her overall consumption in 2009. This is the general finding of a telephone survey carried out by GfK Austria in early November 2008 among 500 respondents, representative for the Austrian population. Moreover, the survey has shown that Austrians are most likely to cut back on consumption in the so-called lifestyle and luxury segments such as luxury groceries, holiday travels and restaurant visits. With the intention of capturing the current expectations of Austrian consumers towards their consumption patterns in 2009, GfK Austria initiated a telephone survey among 500 Austrians in early November this year.

[▶ read more \(pdf\)](#)

## Target On: Discounters in Austria

In response to ongoing discussions about the possible impact on consumer behaviour of increasing food prices, the financial crisis and a possible recession, GfK Austria decided to take a detailed look at the changing preferences for store types within the grocery trade. This multi-client study carried out in 2008 – based on data from the GfK household panel – shows that discounters are the store format that profits most from the precarious income situation of a growing number of Austrian households.

[▶ read more \(pdf\)](#)

## People



**Vera Grasl**

Vera Grasl came to work for GfK early in 2008 and has become an integral part of the Austrian Consumer Goods team. She holds a degree in International Business with special focus on International Marketing. Bringing to the table extensive international knowledge of the food industry as well as the food retailing business, her expertise lies in the area of new product development at national and international levels. (Tel.: +43 1 71710-108)

E-Mail: [▶ Vera Grasl](#)



# Central Eastern Europe

## Otilia Dörnyei nominated as regional CEE co-ordinator for Consumer Goods markets

In the CEE region, GfK has recognised the need to develop regional approaches on the Fast Moving Consumer Goods market. As a result, Otilia Dörnyei, who has been working for GfK Hungary since 2000, has recently been nominated as regional CEE co-ordinator for FMCG markets. The groundwork for this new approach was laid during a GfK Regional CEE meeting, held in Vienna from October 20<sup>th</sup> to 21<sup>st</sup>. A working group, comprising the heads of 17 GfK CEE Consumer Goods Departments, worked out an action plan to cater for the needs of our most valuable clients in the event that they might need a regional approach when discussing market research.

[▶ read more \(pdf\)](#)

# Czech Republic

## Pet food and pet care study 2008

For the first time this year, INCOMA Research, in cooperation with GfK Praha, presents the Pet Food & Pet Care 2008 study concerning pet keepers' preferences, the kind of animal kept, socio-demographic structures, shopping habits, decision-making processes and evaluation of shopping places.

The Czechs are very responsible pet keepers, evidence of which is expressed in the importance they put on the ingredients, taste, health aspect and quality of the food they offer their pets. The pet keepers questioned indicated that price was an important, but by no means crucial, factor when selecting pet food.

[▶ read more \(pdf\)](#)



# Romania

## Promotional leaflets on the up

The GfK Leaflet Monitor is an instrument used in the CEE region to register and analyze information from the retailers' promotional leaflets. This instrument reveals that promotional leaflets have become more and more popular in recent years as a means of communication for retailers in Romania. This is, amongst other factors, a direct result of the constant expansion of retail chains throughout the country. Compared to the first nine months of 2004, the number of leaflets has almost doubled in the same period of 2008.

[▶ read more \(pdf\)](#)

# Czech Republic

## Price sensitivity of Czech customers and the world economic crisis

The world economic crisis is not only a matter of the »Great World« financial results: its driving force is consumer reaction, their willingness to shop, and most of all, their efforts to save on shopping. The first reaction of shoppers to the economic slowdown is to exhibit a certain degree of restriction in their shopping, and this has already been apparent during 2008. However, this has been more a postponement of shopping with a possible cut-back on »excessive« expense so it represents more of an abstinence from shopping and not an entire change in shopping habits.

[▶ read more \(pdf\)](#)



## People



### Krisztián Steigervald

Krisztián Steigervald will take over the role as Sector Manager of the Consumer Goods department at GfK Hungária as of January 1<sup>st</sup>, 2009. Having joined GfK Hungária in 2003, Krisztián Steigervald has been leading the qualitative research department since 2004 with great success. Besides recently building up a knowledge management scheme, he introduced the mobile eye-tracking system at GfK Hungária. In his new role he will be responsible for expanding GfK Hungária's client relationships within the Hungarian Consumer Goods market.  
(Tel.: 0036 1 452 3056)

E-Mail: [▶ Krisztián Steigervald](#)

## Moderate consumption in 2008

After the 17 % growth in FMCG spending seen in 2007, this year's value increases (in local currency) are better, up to 22 % in the first six months of 2008. This upward trend in consumption could seem significant, but it is very much influenced by the food price increases. Looking more closely at the various product groups, it was seen that both the groups food and beverages and household and personal care registered the same growth levels (in terms of value) but for two different reasons.

[▶ read more \(pdf\)](#)

# Russia

**Russians continue to consume goods that save their time and money**

Year on year, Russia is increasingly joining in a global process of change in nutritional cultures. This process is partly manifested as a movement away from the consumption of home-made food towards commercially produced food that is ready-to-eat or requires minimal preparation.

In 2008, Russia is demonstrating a significant increase in the consumption of ready-to-eat convenience food. In addition, there is growth in the consumption of the goods which, like convenience foods, can save people time.

[▶ read more \(pdf\)](#)

# Serbia

**Changes in buying behaviour**

The economic crisis and approaching recession are also becoming a top topic in Serbia nowadays. Although the troubled Serbian economy has successfully avoided the first wave of the crisis (mainly due to the fact they are not part of the main investors' cash flow), the forecast is very cloudy, if not stormy. On the other hand, the political crisis over the past two years concerning the government and their parliamentary majority has also had an effect on tailoring the consumers' mood so that Serbs were already prepared to some extent for the global crisis.

[▶ read more \(pdf\)](#)

## People



**Otilia Dörnyei**

We are pleased to announce that Mrs. Otilia Dörnyei will take over the position as coordinator for GfK's CEE FMCG markets. Otilia joined GfK Hungária in 2000 and acts as Client Management Director in the company's Custom Research Consumer Goods Department. Besides her expertise in the consumer and shopper insights sector, Otilia also has a wide-ranging knowledge of the CEE region, making her the ideal person to fill this challenging position. (Tel.: +36 (1) 452 3047)

E-Mail: [▶ Otilia Dörnyei](#)



# Slovakia

**Coffee consumption patterns in Slovakia**

63 % of people in Slovakia drink coffee every day, with women being the real coffee buffs. They literally adore coffee with the majority of female respondents agreeing that coffee is a great drink. Slovaks generally like to enjoy a cup of coffee in the company of other people. These are the main findings of an online survey conducted by GfK Slovakia in early November 2008 with a sample comprising 514 respondents aged 15 to 60 years. A cup of coffee represents a daily ritual for a large number of Slovaks. Only one in four respondents in the online survey does not drink coffee at all or does so only occasionally.

[▶ read more \(pdf\)](#)

**Sponsorship of sporting events proves effective**

Most Slovaks perceive companies which sponsor events positively, whether they are involved in the sports or culture sectors, whether it is for social causes or for anything else. If consumers have to choose between two products, if one company is sponsoring events and the other is not, more than a third of Slovaks would opt for the product from the event-sponsoring company.

[▶ read more \(pdf\)](#)

## Comments

If you would like to make any comments about our Newsletter or if any other colleagues in your company are interested in our E-Mail News please let us know.

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